

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Atty

Bortolussi, Anton M. (for Jo Ann Soria – Administrator/Petitioner)

Petition for First and Final Account and Report of Administratrix, Petition for Settlement, for Allowance of Attorney Fees and Costs, for Waiver of Commission, and for Final Distribution; (Prob. C. 11623)

Aff.Sub.Wit. Beginning POH - \$400,000.00  Finding Poh - \$400,000.00  Findi	DOD: 10/01/08	with will annexed,   NEEDS/PROBLEMS/COMMENTS:
Account period: 11/10/10 – 06/18/14  Account firem 081814  Accounting - \$400,000.00  Beginning POH - \$400,000.00  Fortified - \$400,000.00  Administrator - \$400,0		OEE CALENDAD
Cont. from 081814   Accounting		<u> </u>
Aff.Sub.Wit.		Account filed 09/11/14
Aff.Sub.Wit.   Beginning POH - \$400,000.00	Cont. from 08181	<b>■</b>
Variable	Aff.Sub.Wit.	0,000.00
Administrator - waived  Not.Cred.	✓ Verified	·
V   Notice of Hrg		
V Notice of Hrg       Attorney Bortolussi - statutory based on time spent on the administration)       Attorney Bortolussi - statutory based on time spent on the administration)       daughter of post deceased daughter, Gloria Lucchesi. How since Gloria died after decedent, Gloria's ¼ interest should pass to estate and does not gate directly to Gloria's daughter. Need Amended Petition an Order.         Pers.Serv.       Attorney Bortolussi costs- \$496.50 (filling fees, certified copies, recording fees)       \$496.50 (filling fees, certified after decedent, Gloria's ¼ interest should pass to estate and does not gate directly to Gloria's daughter. Need Amended Petition an Order.         Letters       11/10/10       Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filled a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is in a position to closed at this time due the estate's involvement ongoing litigation.	✓ PTC	GISTING THE 74 OF THE
Hrg administration)  ✓ Aff.Mail w/ Aff.Pub.  Sp.Ntc.  Pers.Serv.  Attorney Fanucchi costs- Screen  Conf. Screen  Duties/Supp  Objections  Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Receipt  CI Report  ✓ 9202  Order  Attorney Bortolussi costs- \$496.50 (filing fees, publication)  Attorney Fanucchi costs- \$2.262.50 (to be paid by Petitioner outside of the probate estate for filing fees, publication, certified copies, probate referee)  2. The Petition indicates there is ongoing litigation. Administrator of this exist a party. Therefore it does not paid by Petitioner outside of the probate estate for filing fees, publication, certified copies, probate referee)  Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & ongoing litigation.		<b>0.00</b> (less than daughter of post
Aff.Mail		•
Attorney Bortolussi costs- \$496.50 (filing fees, certified copies, recording fees)    Sp.Ntc.	_	· · ·
Sp.Ntc.  Pers.Serv.  Attorney Fanucchi costs- Screen  Letters 11/10/10  Duties/Supp  Objections  Video Receipt  CI Report  CI Report  CI Report  Corder  Cordination certified copies, recording fees)  Certified copies, recording fees)  Attorney Fanucchi costs- Screen  Attorney Fanucchi costs- Screen  Petitioner outside of the probate estate for filing fees, publication, certified copies, probate referee)  Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & interest should pass to estate and does not gaughter. Need Amended Petition an Order.  2. The Petition indicates there is ongoing litigation to which Petitioner, as Administrator of this exist a party. Therefore it does not appear that estate is in a position to closed at this time due the estate's involvement ongoing litigation.		
Sp.Nrc.   Pers.Serv.   Attorney Fanucchi costs- \$2.262.50 (to be paid by Petitioner outside of the probate estate for filling fees, publication, certified copies, probate referee)   Duties/Supp   Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & estate and ades nor adirectly to Gloria's adaughter. Need Amended Petition an Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation.		interest should pass to her
Aftorney Fanucchi costs- Conf. Screen  Letters 11/10/10  Duties/Supp  Objections  Video Receipt  CI Report  CI Report  Vorder  Corder  Aftorney Fanucchi costs- S2.262.50 (to be paid by Petitioner outside of the probate estate for filing fees, publication, certified copies, probate referee)  Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & adaughter. Need Amended Petition an Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petitioner outside of the probate estate to which Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.  2. The Petition indicates there is ongoing litigation and Order.		estate and does not pass
Screen   for filing fees, publication, certified copies, probate referee)   Duties/Supp   Petitioner states that her former attorney's   Quinlan, Kershaw & Fanucchi, filed a Notice of   Lien for Statutory Attorneys' Fees and   Receipt   Rembursement for Costs Advanced stating a   lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the   basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory &   Amended Telimion and Order.   Orde		<b>262.50</b> (to be daughter, Need
Letters 11/10/10         Duties/Supp         Objections       Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & ongoing litigation.		7 thoras a roman and
Duties/Supp  Objections  Video Receipt  CI Report  ✓ 9202  ✓ Order  Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory &  2. The Petition indicates there is ongoing litigation.		lied copies, Order.
Petitioner states that her former attorney's Quinlan, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & there is ongoing lifigation.  to which Petitioner, as Administrator of this exist is a party. Therefore it does not appear that estate is in a position to closed at this time due to the estate's involvement ongoing lifigation.		2. The Petition indicates that
Video Receipt  CI Report  ✓ 9202  ✓ Order  Counting, Kershaw & Fanucchi, filed a Notice of Lien for Statutory Attorneys' Fees and Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & incorrect based in the estate's involvement on going litigation.		er attorney's there is ongoing litigation
Reimbursement for Costs Advanced stating a lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & is a party. Therefore it does not appear that estate is in a position to closed at this time due to the estate's involvement ongoing litigation.		A dissipation of the contests
CI Report    CI Report   lien for prior attorneys' fees had been created in the amount of \$12,127.64 calculated on the basis of a total estate of \$456,381.94. This is incorrect based on the Amended Inventory & ongoing litigation.    CI Report   does not appear that estate is in a position to closed at this time due the estate's involvement on the state of \$456,381.94. This is incorrect based on the Amended Inventory & ongoing litigation.		is a party. Therefore it
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basis of a total estate of \$456,381.94. This is the estate's involvement incorrect based on the Amended Inventory & ongoing litigation.		esidie is in a position to be
	✓ Order	381.94. This is the estate's involvement in
II I Appraisal filed by Petitioner indicating that the I		,
total value of the estate was \$409,138.12. For Mr. Fanucchi:		9
Petitioner has filed an Objection to the Lien and 1. Declaration of Mr.		
asserts that the Statutory Attorney's fees Fanucchi filed on 8/14		nev's fees Fanucchi filed on 8/14/14 is
amount to \$11,227.63 rather than \$12,127.64.  actually an objection		actually an objection and actually an objection and actually an objection and
Petitioner states that the value of the estate filing fee of \$435.00 is		filing fee of \$435,00 is due
Aff. Posting assumed by Petitioner was and remains as of this accounting \$400,000.00. Petitioner alleges	Aff. Posting	Reviewed by: IF
Status Rpt that such assets received by her are all the Reviewed on: 09/17/14	Status Rpt	Povious don: 00/17/14
UCCJEA assets of the estate that have come to Updates:		come to Updates:
Citation         Petitioner's knowledge or into her possession.         Recommendation:		1101 (2030031011)
✓    FTB Notice    Continued on Page 2    File 2 – Lucchesi	✓ FTB Notice	ge 2   File 2 - Lucchesi

### 2 Anita Lucchesi (Estate)

Page 2

Petitioner requests approval to pay Quinlan, Kershaw & Fanucchi costs outside of probate. However, due to the massive conflict between the Estate and Mr. Fanucchi for the entirety of representation, which caused the probate to be significantly delayed, Petitioner requests that attorney's fees for Mr. Fanucchi be denied.

Case No. 08CEPR01101

Petitioner states that on 06/23/14, Mr. Fanucchi filed a lawsuit against Petitioner individually and as Administrator of the Estates of Anita Lucchesi and Gloria Lucchesi, Jack Lucchesi, and Linda Hofer for Recission, Restitution and Damages (Fresno Superior Court Case No. 14CECG01795). This lawsuit stems from the conflict of interest that caused Petitioner to seek a new attorney in the final stages of this probate.

Petitioner states that all funds in the estate were depleted during the administration by Jack Lucchesi, the former administrator, for maintenance and expenses of the real properties.

#### Distribution, pursuant to Decedent's Will, is to:

Jo Ann Soria - 1/4 interest in real property
Jack Lucchesi - 1/4 interest in real property
Linda Hofer - 1/4 interest in real property
Anita Lucchesi - 1/4 interest in real property

# Declaration of Edward L. Fanucchi Re Request or Denial of Attorneys' Fees and Reimbursement of Costs filed 08/14/14 states:

- 1. Quinlan, Kershaw & Fanucchi, LLP acted as the attorney for the former executor, Jack Lucchesi and subsequently for the Petitioner/successor Administrator for the duration of the administration of the estate until Petitioner substituted in attorney Bortolussi on 05/14/14.
- 2. Starting in 2007, property values plummeted in the area and there was no ability to market the property, the Executor agreed that the property could not be marketed and that situation persists today with no buyers for the property. The property was the only asset of the estate and the best way to manage the estate was to hold the property in the estate under the control of one person, being the Executor. This strategy was discussed and approved by the Executor for the benefit of the beneficiaries
- 3. On 04/17/14, Attorney Fanucchi prepared the First and Final Account and for Final Distribution on behalf of the Administrator. As of that date, all matters to be completed in the estate had been done and the estate was in a condition to be closed.
- 4. On 04/23/14, the First and Final Account and for Final Distribution was mailed to attorney Bortolussi for review and execution by Jo Ann Soria, however, Ms. Soria refused to sign the Account.
- 5. It would appear that there would be no resolution to the dispute that developed between the Administratrix, Jack Lucchesi and Linda Hofer on the one hand and Mr. Fanucchi on the other hand. On 5/8/14, a substitution of attorney was executed.
- 6. On 7/7/14, a First and Final Account was filed on behalf of JoAnn Soria by Anton M. Bortolussi. The account requests denial of statutory attorneys' fees to Quinlan, Kershaw and Fanucchi, LLP in the amount of \$11,227.63. Quinlan, Kershaw and Fanucchi requests that said attorney fees be paid by the beneficiaries outside of probate in that all the work in the estate had been completed prior to the time the dispute between the beneficiaries and Mr. Fanucchi.
- 7. The estate had no funds to pay the legal costs to bring on and continue this estate, so they were all advanced by the law firm of the undersigned and need to be reimbursed to this law firm now, or, in the alternative, become a judgment lien on the 20 acres of realty in this estate as legally described in the Petition for Final Distribution located at 3665 N. Hayes, Fresno, CA 93723. The same is true for attorneys' fees as ordered by the Court.

Atty

Kruthers, Heather H (for Petitioner/Conservator Public Guardian)

(1) Second Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

Account period: 8/1/12 – 7/31/14  Accounting - \$55,120.70 Beginning POH - \$24,286.55 Ending POH - \$1,723.01  Verified  Conservator - \$2,300.64 [13.61 Deputy hours @ \$96/hr and 13.08]  PTC  Note: If the petition is granted, status hearings will be set as follows:  Note: If the petition is granted, status hearings will be set as follows:  Note: If the petition is granted, status hearings will be set as follows:  Note: If the petition is granted, status hearings will be set as follows:  PWednesday, September 28, 2016 at 9:00 a.m. in Department 303, for the filling of the third account.  Pursuant to Local Rule 7.5 if the	_	e: 86 years	PUBLIC GUARDIAN, Conservator, is	NEEDS/PROBLEMS/COMMENTS:
Cont. from Beginning POH - \$24,286.55 Ending POH - \$2,200.64 (13.61 Deputy hours @ \$76/hr)  Not.Cred.	ВС	D. 11/12/1727	petitioner.	
Cont. from				Note: If the petition is granted, status
Aff.Sub.Wif.  Verified  Conservator  PTC  Not.Cred.  Aff.Mail  Pers.Serv.  Dutlies/Supp  Objections  Video  Receipt  Corf. Screen  Aff. Posting  Status Rpt  Voerified  Staff hours  Aff. Posting  Status Rpt  Letters  Aff. Posting  Status Rpt  UCCJEA  Ending POH - \$1,723.01  S \$1,723.01  S \$2,300.64  (13.61 Deputy hours @ \$96/hr and 13.08  \$2,300.64  (13.61 Deputy hours @ \$96/hr and 13.08  Staff hours @ \$76/hr)  Attorney - \$1,250.00  (less than allowed per Local Rule)  Bond fee - \$50 (o.k.)  Petitioner prays for an Order:  1. Approving, allowing and settling the second account;  2. Authorizing the conservator and attorney fees and commissions;  3. Payment of the bond fee.  Reviewed by: KT  Reviewed on: 9/22/14  Updates:	Со	nt. from	_	hearings will be set as follows:
Conservator   \$2,300.64     Inventory		Aff.Sub.Wit.		Wednesday, September 28, 2016
Inventory   PTC   Staff hours @ \$76/hr   Aftorney   - \$1,250.00   Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.    Aff. Pub.	✓	Verified	Conservator - <b>\$2,300.64</b>	·
Not.Cred.			· · · · · · · · · · · · · · · · · · ·	for the filling of the fillia account.
Notice of Hrg			, , , , , , , , , , , , , , , , , , ,	
Hrg  ✓ Aff.Mail  ✓ Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp Objections  Video Receipt CI Report 9202 ✓ Order  Aff. Posting Status Rpt UCCJEA  Bond fee - \$50 (o.k.) Petitioner prays for an Order:  1. Approving, allowing and settling the second account;  2. Authorizing the conservator and attorney fees and commissions;  3. Payment of the bond fee.  Reviewed by: KT Reviewed on: 9/22/14 Updates:				required documents are filed 10 days
Aff. Mail W/ Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 V Order Aff. Posting Status Rpt UCCJEA Petitioner prays for an Order:  1. Approving, allowing and settling the second account; 2. Authorizing the conservator and attorney fees and commissions; 3. Payment of the bond fee.  Reviewed by: KT Reviewed on: 9/22/14 Updates:	<b>\</b>			ı ·
Aff. Pub.  Sp. Ntc.  Pers. Serv.  Conf. Screen  Letters  Duties/Supp Objections  Video Receipt  CI Report  9202  Order  Aff. Posting Status Rpt UCCJEA  1. Approving, allowing and settling the second account;  2. Authorizing the conservator and attorney fees and commissions;  3. Payment of the bond fee.  Reviewed by: KT Reviewed on: 9/22/14 Updates:	<b>✓</b>	Aff.Mail W/		appearance will be required.
Pers.Serv.  Conf. Screen  Letters  Duties/Supp Objections  Video Receipt CI Report 9202 √ Order  Aff. Posting Status Rpt UCCJEA  Second account;  2. Authorizing the conservator and attorney fees and commissions;  Reviewed by: KT Reviewed on: 9/22/14 Updates:		Aff.Pub.		
Conf.   Screen   2. Authorizing the conservator and attorney fees and commissions;   Letters   Duties/Supp   3. Payment of the bond fee.     Video   Receipt   CI Report   9202   ✓ Order   Aff. Posting   Status Rpt   UCCJEA       Reviewed on: 9/22/14     Updates:		•	_ , ,	
Screen Letters Duties/Supp Objections Video Receipt CI Report 9202  Order Aff. Posting Status Rpt UCCJEA  Z. Authorizing the conservator and attorney fees and commissions;  Reviewed by: KT Reviewed on: 9/22/14 Updates:			second decoon,	
Letters  Duties/Supp Objections  Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA  And Commissions,  Payment of the bond fee.  Reviewed by: KT Reviewed on: 9/22/14 Updates:				
Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Video Receipt  Reviewed by: KT Reviewed on: 9/22/14  Updates:			afforney fees and commissions;	
Video   Receipt   CI Report   9202   ✓ Order   Aff. Posting   Status Rpt   UCCJEA   Reviewed by: KT  Reviewed on: 9/22/14  Updates:		Duties/Supp	3. Payment of the bond fee.	
Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Reviewed by: KT  Reviewed on: 9/22/14  Updates:				
CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Reviewed by: KT  Reviewed on: 9/22/14  Updates:				
9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Reviewed by: KT  Reviewed on: 9/22/14  Updates:				
Aff. Posting  Status Rpt  UCCJEA  Reviewed by: KT  Reviewed on: 9/22/14  Updates:				
Status Rpt UCCJEA Reviewed on: 9/22/14 Updates:	✓	Order		
UCCJEA Updates:		Aff. Posting		Reviewed by: KT
		· ·		
Citation   Recommendation:				•
FTB Notice File 3 - Miller		FTB Notice		File 3 - Miller

Atty

Bortolussi, Anton M. (for Administrator JoAnn Soria)

Petition for First and Final Account and Report of Administratrix, Petition for Settlement, for Allowance of Attorney's Fees and Costs, for Waiver of Commission, and for Final Distribution (Prob. C. 11623)

DC	DD: 4/23/10	JO ANN SORIA, Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 9/9/10 - 3/18/14	OFF CALENDAR. Amended
		Accounting - \$83,750.00	Petition filed and set for hearing on 10/16/14.
Co	ont. from 081814	Beginning POH - <b>\$83,750.00</b>	011 10, 10, 14.
	Aff.Sub.Wit.	Ending POH - \$83,750.00	1. According to the petition
✓	Verified	Attorney Fanucchi cost - \$799.00	there is a pending lawsuit
<b>/</b>	Inventory	Anomey ranocenicosi - \$777.00	involving the Administrator of
Ė	PTC	Attorney Bortolussi costs - \$799.00	this estate, Jo Ann Soria in her capacity as
✓	PIC		Administrator. Therefore it
✓	Not.Cred.	Attorney Bortolussi - <b>\$800.00</b> – less than	appears that the estate is
./	Notice of Hrg	statutory based on time spent on the administration.	not in a condition to close.
Ě	Aff.Mail W/		O Detition requires to the at the
<b>✓</b>	All.Mail VV/	Petition states Attorney Edward Fanucchi	2. Petition requests that the Creditor's Claim filed by the
	Aff.Pub.	was the estate's attorney prior to the filing	Department of Health Care
✓	Sp.Ntc.	of a Substitution of Attorney on 5/15/14.	Services (DHCS) in the
	Pers.Serv.	Attorney Fanucchi filed a Notice of Lien for Statutory Attorney Fees and	amount of \$74,720.18
	Conf. Screen	Reimbursement for Costs Advanced stating	become a lien against the
./	<b>Letters</b> 11/18/10	_	estate's real property. Need agreement from DHCS to
È	Duties/Supp	created in the amount of \$4,000.00. The	the terms of the lien prior to
	Objections	rate of compensation was computed on	distribution.
	Video	the basis of a total estate of \$100,000.00.  This is incorrect based on the Amended	
	Receipt	Inventory and Appraisal filed by Petitioner.	3. Order does not comply with Local Rule 7.6.1F – Some
	CI Report	Mr. Fanucchi's statutory amount at most	portion of the contents of
/	9202	would be \$3,350.00. Due to the conflict	the order must appear on
<b> </b>	Order	between the Estate and Mr. Fanucchi for	the page which the judge's
<b>√</b>	Order	the entirety of representation, which caused the probate to be significantly	signature is affixed. Need
		delayed, <b>petitioner requests that attorney</b>	new order.
		fees to Mr. Fanucchi be denied.	
	Aff. Posting	1	Reviewed by: KT
	Status Rpt	1	Reviewed on: 9/16/14
	UCCJEA		Updates:
	Citation		Recommendation:
✓	FTB Notice		File 4 – Luccesi
	<u> </u>		4

## 5 Dorothy Jean Smith (CONS/PE)

Case No. 12CEPR00452

Atty Kruthers, Heather H. (for Public Guardian – Conservator of the Estate/Petitioner)

(1) First and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and his Attorney; and (3) Distribution

DC	D: 10/18/12		PUBLIC ADMINISTRA Estate, is Petitioner.		Conservator of the	NEEDS/PROBLEMS/COMMENTS:
			Account period: 06		- 10/18/12	CONTINUED FROM 07/21/14 Minute Order for 07/21/14
052	nt. from 04241 2714, 062414, 2114	14,	Accounting Beginning POH Ending POH	- - -	\$733,869.23 \$655,215.93 \$578,727.55	states: The Court grants the petition for fees. Ms. Kruthers is directed to prepare the order.
072	Aff.Sub.Wit.		Subsequent accou	ınt perio	od: <b>10/19/12 -</b>	The account and petition for distribution are continued to
✓ 	Verified Inventory PTC Not.Cred.		Accounting Beginning POH Ending POH (\$62,645.20 is cash)		\$728,711.54 \$578,727.55 \$605,382.95	09/22/14.
✓ ✓	Notice of Hrg Aff.Mail	w/	Conservator staff hours @ \$76/h hours @ \$96/hr.)	_	<b>\$7,482.62</b> (26.09 57.29 deputy	
	Aff.Pub. Sp.Ntc.		Attorney per Local Rule)	-	<b>\$2,500.00</b> (ok	
	Pers.Serv.		Bond fee	-	<b>\$769.44</b> (ok)	
	Screen Letters		Costs fees and certified o	- copies)	<b>\$539.00</b> (filling	
	Duties/Supp Objections		Petitioner states the trust and her assets			
	Video Receipt		Michael Smith, con trustee of her trust. distribution of the re	Petitio emainir	ner requests ng cash of	
	CI Report 2620	n/a	\$51,354.17 and per be made to her so trustee of her trust.			
✓	Order		ilusiee oi nei ilusi.			
	Aff. Posting		Petitioner prays for			Reviewed by: JF
	Status Rpt		<ol> <li>Finding that the person and est</li> </ol>		rvatorship of the	<b>Reviewed on:</b> 09/17/14
	UCCJEA		10/18/12, the co			Updates:
	Citation		death;	in a au	ad actiliae the first	Recommendation:
	FTB Notice		<ol> <li>Approving, alloand final accounts</li> <li>Authorizing the attorney fees at authorizing payand costs; and</li> <li>Authorizing distrof property as some (and above).</li> </ol>	unt; conser nd con ment c ibution tated ir	vator and nmissions; If the bond fee of the balance in the Petition	File 5 – Smith

### 5 Dorothy Jean Smith (CONS/PE)

Case No. 12CEPR00452

Page 2

Objection to First and Final Account and Report of Conservator and Petition for Distribution filed 04/22/14 by Mike (Butch) Smith, Jr. states:

- 1. The Petition for Distribution requests to distribute the remaining assets of the conservatorship estate to the conservatee's trust to Michael Smith, as trustee of that Trust.
- 2. Petitioner reports that the conservatorship estate is holding cash assets in the amount of \$62,645.29 and other non-cash assets.
- 3. Objecting party alleges that the Jean Smith conservatorship estate owes Ben Smith (conservatee's husband) \$116,398.12 [itemization and reasoning provided].
- 4. Objector further alleges that the conservatee owes \$6,203.99 to the State of California for the 2011 tax year and states this should be cleared before distribution of the conservatorship estate.

Atty

Armo, Lance E. (for Roger Day – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

	nt. from 041814, 2214  Aff.Sub.Wit.  Verified Inventory  PTC Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen Letters Duties/Supp Objections  Video Receipt CI Report  9202 Order	ROGER DAY, son, was appointed Executor with full IAEA authority without bond on 02/20/2013.  Letters issued 02/25/2013.  Inventory & Appraisal filed 02/26/2013 shows an estate valued at \$190,000.00 consisting of real property.  Minute Order of 02/20/2013 set this matter for hearing.	Minute Order of 08/22/2014: Status Hearing may come off if petition is filed.  1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Aff. Posting	-	Reviewed by: LV
	Status Rpt	-	Reviewed by: 17  Reviewed on: 09/16/2014
	UCCJEA	-	Updates:
		-	
	Citation	-	Recommendation:
$\vdash$	FTB Notice	-	File 6 - Day

Timothy Lee Dupree (Estate)

Krbechek, Randolf (for Julie Raviscioni – Administrator)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

-	status Hearing Re: Filing of the First Accou	
DOD: 09/01/2012	JULIE RAVISCIONI, daughter was	NEEDS/PROBLEMS/COMMENTS:
	appointed Administrator with full IAEA	
	authority without bond on 05/15/2013.	Page 7B is the Order to Show Cause
	╡	for Failure to Appear.
	Letters issued 05/16/2013	
Cont. from 071814,		Minute Order of 08/18/2014: Mr.
081814	Final Inventory and Appraisal filed	Krbechek is in trial and requests a
Aff.Sub.Wit.	11/06/2013 shows an estate valued at	continuance.
Verified	\$182,150.00.	
Inventory	A 4 in a 4 a 0 in lange of 0.5 / 1.5 / 0.0 1.4 a a 4 libria	Minute Order of 07/18/2014 (Judge
PTC	Minute Order of 05/15/2014 set this status hearing for the filing of the First	Kristi Culver Kapetan): No appearances. Order to personally
Not.Cred.	Account and/or Petition for Final	appear issued for Mr. Krbecheck.
Notice of	Distribution.	
Hrg	]	1. Need First Account or Petition for
Aff.Mail	Former Declaration of Randolf	Final Distribution or current written
Aff.Pub.	Krbecheck Regarding the Status of	status report pursuant to Local
Sp.Ntc.	Action and Request for Continuance filed 08/11/2014 states he cannot	Rule 7.5 which states in all matters
Pers.Serv.	attend the hearing set for 08/18/2014	set for status hearing verified
Conf.	because he is required to be in	status reports must be filed no
Screen	Redwood City at the same time for trial	later than 10 days before the
Letters	in a pending superior court action. The	hearing. Status Reports must
Duties/Supp	trial is set to commence on 08/11/2014.	comply with the applicable code
Objections	Attorney Krbecheck respectfully requests the court continue the hearing	requirements. Notice of the status
Video	on this matter to the next available	hearing, together with a copy of
Receipt	date.	the Status Report shall be served
CI Report		on all necessary parties.
9202	]	
Order		
Aff. Posting		Reviewed by: LV
Status Rpt	]	<b>Reviewed on:</b> 09/16/2014
UCCJEA	]	Updates:
Citation	]	Recommendation:
FTB Notice		File 7A – Dupree
		7Δ

**7A** 

Timothy Lee Dupree (Estate)
Krbechek, Randolf (for Julie Raviscioni – Administrator)
OSC Re: Failure to Appear

	OSC Re. Fallore to Appear	
DOD: 09/01/2012	JULIE RAVISCIONI, daughter was	NEEDS/PROBLEMS/COMMENTS:
	appointed Administrator with full IAEA	
	authority without bond on 05/15/2013.	Minute Order of 08/18/2014: Mr.
		Krbechek is in trial and requests a
0 1 ( 001014	Minute Order of 07/18/2014 (Judge Kristi	continuance.
Cont. from 081814	Culver Kapetan): No appearances.	
Aff.Sub.Wit.	Order to personally appear issued for	
Verified	Mr. Krbecheck.	
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		<b>Reviewed on:</b> 09/16/2014
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 7B – Dupree
		7.0

Motsenbocker, Gary L. (for Steven Collins – Administrator)
Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

	Tallos freding ke. Filling of the Filst Accou	1
DOD: 02/17/13	STEVEN COLLINS, son, was appointed as	NEEDS/PROBLEMS/COMMENTS:
	Administrator with full IAEA and without	
	bond on 06/19/13. Letters of	CONTINUED FROM 08/22/14
	Administration were issued on 06/19/13.	As of 09/17/14, nothing further has
		been filed.
Cont. from 082214	Inventory & Appraisal, final, was filed on	
Aff.Sub.Wit.	10/22/13 - \$154,000.00	Need Account/Report of
Verified	<u> </u>	Administration and Petition for
Inventory	Report of Status of First Account Current	Distribution.
PTC	filed 08/19/14 states: it is anticipated that the first account petition will be	
Not.Cred.	completed within 3 weeks. A 30 day	
Notice of	continuance is requested.	
Hrg	· ·	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.	7	
Screen		
Letters		
Duties/Supp		
Objections		
Video	7	
Receipt		
CI Report		
9202	]	
Order		
Aff. Posting	_	Reviewed by: JF
Status Rpt		<b>Reviewed on:</b> 09/17/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 8 – Collins

Atty Attý George Joaquin Galvan (Estate)

Cowin, Michael D. (Pro Per Petitioner)

Cowin, Daniel Ray (Pro Per Petitioner)

Petition for Termination of Proceedings and Discharge of Personal Representative

	Petition for Termination of Proceedings and	Discharge of Personal Representative
DOD: 8-16-13	MICHAEL D. COWIN and DANIEL RAY	NEEDS/PROBLEMS/COMMENTS:
	COWIN, Named Executors, are	1. The progression of this estate is
	Petitioners.	highly unusual. Need clarification:
		Were there assets that were
G =1 f 000 41 4	History: Decedent's will dated 3-19-04	marshaled by Petitioners and
Cont from 080414	devises his estate to his four surviving	distributed outside of probate? If so, how was it determined that they were
Aff.Sub.Wit.	step-sons: Alvin Leon Cowin, Kenneth Paul Cowin, Michael Dale Cowin, and	not subject to probate?
Verified	Daniel Ray Cowin, and nominates	It was originally alleged that there was
Inventory	Michael Dale Cowin and Daniel Ray	approx. \$220,000 in personal property
PTC	Cowin as co-executors.	assets, the nature of which is
Not.Cred.		unknown; however, the first mediation
Notice of	On 12-3-13, Michael Cowin filed a	agreement refers to various accounts,
Hrg	petition for probate requesting	policies, etc. The second mediation agreement indicates that Daniel was
Aff.Mail	appointment of himself, alone, as	in possession of approx. \$21,000 that
Aff.Pub.	executor.	he was to distribute to his brothers.
	At the hearing on 1-23-14, Daniel Cowin	This petition now states this is a "no-
Sp.Ntc.	also appeared and the Court referred	asset estate" but also refers to the
Pers.Serv.	the two of them to mediation and	mediation agreement(s).
Conf.	continued the matter to 1-27-14.	There is no explanation of how it was
Screen		determined that the assets were not
Letters	On 1-24-14, Michael filed a declaration	subject to administration, and no explanation as to the discrepancy in
Duties/Supp	that attached an agreement that the he	the amounts.
Objections	and Daniel reached in mediation. The	Probate estates are protective
Video	agreement dated 1-23-14 refers to exchange of information regarding	proceedings designed to ensure that
Receipt	various and numerous assets, and states	all interested persons have been
CI Report	they will work together as executors.	given notice, etc. This includes heirs
9202	Therefore, at hearing on 1-27-14,	and potential creditors of the decedent, as well as various
Order	Michael's petition was denied, and the	governmental agencies, such as the
	Court directed that an amended	Franchise Tax Board and the Dept. of
	petition be filed.	Health Care Services. As such, there
	On 2-11-14, Michael and Daniel together	are various types of proceedings, and various steps required for each type.
	filed an amended Petition for Probate of	
	Will and for Letters Testamentary as co-	In a probate estate, Court authorization is necessary before any
	executors. The amended petition	distribution of assets. The mediation
	estimated that the estate contained	services that are available to litigants
	approx. \$220,000.00 in personal property	are not a substitute for the procedures
	assets. Hearing was set for 3-13-14.	required by law.
	On 2 10 14 Daniel filed a declaration	Because Petitioners are not
	On 3-10-14, Daniel filed a declaration that attached another agreement,	represented by legal counsel,
	apparently reached in mediation on	Examiner brings up these details for the Court's consideration, even
	3-10-14. According to the agreement,	though the will was never admitted to
	mediation was attended by Michael	probate and Letters never issued.
Aff. Posting	Cowin, Daniel Cowin, and Bill Cowin.	Reviewed by: skc
Status Rpt	(Note: It is unclear who Bill Cowin is.). This	Reviewed on: 9-16-14
UCCJEA	agreement appears to require Daniel to	Updates:
Citation	distribute \$21,000 total, with interest, to	Recommendation:
FTB Notice	Alvin, Kenneth, and Michael on a payment schedule.	File 10A – Galvan
	SEE ADDITIONAL PAGES	
		104
		10A

### 10A George Joaquin Galvan (Estate)

#### Case No. 13CEPR01046

#### Page 2

The Minute Order from the hearing on 3-13-14 states: "The Court is advised that an agreement was reached during mediation. Petitioners to file a petition to close an estate with no assets." The matter was continued to 5-1-14.

There were no appearances at the continued hearing on 5-1-14. The Court continued the matter to 6-26-14 and also issued an Order to Show Cause for failure to appear.

On 6-26-14, Michael, Daniel, and William Cowin appeared. (Again, it is unclear who William Cowin is.)

The OSC was dismissed, and the matter was continued to 9-11-14 for the filing of the "amended petition."

Therefore, on 6-27-14, the instant petition was filed.

The petition states: "There is no property of any kind belonging to the estate and subject to administration; <u>after probate mediation agreement</u>." The petition requests that the Court terminate administration and discharge the personal representative.

Also filed with the petition are declarations from Alvin Leon Cowin, Kenneth Paul Cowin, Michael Dale Cowin, and Daniel Ray Cowin, confirming notice of the petition and the mediation agreement, and confirming their understanding that this is a "no asset estate."

Atty Cowin, Michael D. (Pro Per Petitioner)
Atty Cowin, Daniel Ray (Pro Per Petitioner)

Order to Show Cause Re: Petition for Termination of Proceedings and Discharge of Personal Representative

DOD: 8-16-13	MICHAEL D. COWIN and DANIEL RAY	NEEDS/PROBLEMS/COMMENTS:
202.0 10 10	COWIN filed an amended Petition for	NEEDS, I RODELMS, COMMENTS.
	Probate on 2-11-14.	See Page A for case history, details.
	After regulating vericus grave and enterin	
	<ul><li>After reaching various agreements in mediation regarding distribution of</li></ul>	
Aff.Sub.Wit.	assets, the Petitioners filed a Petition for	
Verified	Termination of Proceedings, which was	
Inventory	set for hearing on 8-4-14.	
PTC	=	
Not.Cred.	Examiner Notes noted various issues with this estate, the mediation	
Notice of	agreements filed, and the Petition for	
Hrg	Termination of Proceedings.	
Aff.Mail	7	
Aff.Pub.	At the hearing on 8-4-14, there were no	
Sp.Ntc.	appearances and the Court issued this	
Pers.Serv.	<ul><li>Order to Show Cause for the petitioners</li><li>to be personally present to explain the</li></ul>	
Conf.	request for termination of proceedings.	
Screen	request for ferrimaners of proceedings.	
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report	_	
9202		
Order	4	
Aff. Posting	_	Reviewed by: skc
Status Rpt	_	<b>Reviewed on:</b> 9-16-14
UCCJEA	4	Updates:
Citation	-	Recommendation:
FTB Notice		File 10B - Galvan

10B

LeVan, Nancy J. (for Trustee Susan Brown)

Probate Status Hearing RE: Filing Blocked Account Receipt

Verified   This status hearing was set for the filing of the receipt for blocked account.   Status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.		SANDRA BROWN is Trustee.	NEEDS/PROBLEMS/COMMENTS:
9202 Order	Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt  CI Report  9202  Order	On 8/18/14 the Court approved the sale of the real property for \$130,000 and order the proceeds of the sale into a blocked account.  This status hearing was set for the filing	1. Need receipt for blocked account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Aff. Posting   Reviewed by: KT   Reviewed on: 9/22/14			
UCCJEA Updates:			
Citation   Recommendation:			•
FTB Notice File 11 - Eastwood			

### Douglas E. Coolidge (Estate) Atty

12

Atty

Case No. 14CEPR00352

Helon, Marvin T (for Randall D. Coolidge and Tracie Coolidge-Fierro – Competing Petitioners) Janisse, Ryan Michael (for Dianne E. Coolidge – Petitioner – Surviving Spouse)

Status Hearing re: Filing of the Bond

DC	D: 02/18/2014		<b>DIANNE E. COOLIDGE</b> , surviving spouse was	NEEDS/PROBLEMS/COMMENTS:
			appointed as Administrator with full IAEA	
			authority with bond set at \$597,000.00 on	Continued from 08/20/2014
			07/09/2014.	
				1. Need Bond in the amount of
	ont. from		Minute Order of 07/09/2014 set this Status	\$597,000.00.
07	0914, 082014	ı	Hearing.	
	Aff.Sub.Wit.			
	Verified		Minute Order of 07/09/2014: The Court does	
	Inventory		not find any undue delay in Dianne	
	PTC		Coolidge filing her petition. The Court grants the petition as to Dianne Coolidge. The	
	Not.Cred.		petition as to Randall Coolidge and Tracie	
	Notice of		Coolidge-Fierro will be continued to	
	Hrg		08/20/2014 pending Dianne Coolidge	
	Aff.Mail		obtaining a bond. If the bond is obtained	
	Aff.Pub.		by Dianne Coolidge, this petition will be	
	Sp.Ntc.		dismissed upon the filing of said bond. If a bond is not obtained, this matter will remain	
	Pers.Serv.		on calendar for 08/20/2014 for further	
	Conf.		hearing.	
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by: ∠∨
	Status Rpt			<b>Reviewed on:</b> 09/17/2014
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 12 – Coolidge

12

Gloria Andrade (CONS/PE)
Teixeira, J. Stanley (for Conservator Tracy Cerda)
Status Hearing Re: Bond

Age: 75 years	TRACY CERDA was appointed	NEEDS/PROBLEMS/COMMENTS:
	conservator of the person and estate	
	on 8/4/14 with bond set at \$12,760.00.	
	<b>1</b>	1. Need bond of \$12,760.00
Cont. from	This status hearing was set for the filing	or current written status
Aff.Sub.Wit.	of the bond.	report pursuant to Local
Verified		Rule 7.5 which states in all
		matters set for status
Inventory		
PTC		hearing verified status
Not.Cred.		reports must be filed no
Notice of		later than 10 days before
Hrg		the hearing. Status Reports
Aff.Mail		must comply with the
Aff.Pub.		applicable code
Sp.Ntc.		requirements. Notice of
Pers.Serv.		•
Conf.		the status hearing,
Screen		together with a copy of
Letters		the Status Report shall be
Duties/Supp		served on all necessary
Objections		parties.
Video		·
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 9/16/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13 - Andrade
	<u> </u>	

Shepard, Jeff S. (for Douglas S. Loper – Petitioner – Son)

Petition for Probate of Will and for Letters Administration with Will Annexed; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D. 07/0//0012		
טע	D: 07/26/2013		DO
			and
			Adr with
			VVIII
Со	ont. from 082114	1	Allh
	Aff.Sub.Wit.	Х	Dou
✓	Verified		Full
	Inventory		1011
	PTC		Will
	Not.Cred.		
<b>√</b>	Notice of		Res
	Hrg		Pub
✓	Aff.Mail		Estir
✓	Aff.Pub.		Pers
	Sp.Ntc.		Rec Tota
	Pers.Serv.		
	Conf.		Prol
	Screen		
	Letters	Х	
✓	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order	Х	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

**DOUGLAS S. LOPER**, son is petitioner and requests appointment as Administrator with Will annexed without bond.

All heirs waive bond and nominate Douglas S. Loper.

Full IAE – o.k.

Will dated: 07/16/1990

Residence: Fowler

Publication: The Business Journal

#### stimated value of the Estate:

 Personal property \$575.00

 Real property \$175,000.00

 Total \$175,575.00

Probate Referee: Rick Smith

#### **NEEDS/PROBLEMS/COMMENTS:**

 Will is not self-proving. Need proof of subscribing witness.

Declaration filed 09/04/2014 by Douglas S. Loper, petitioner, states he is the son of the decedent and has corresponded with the decedent throughout her lifetime. He has personal knowledge of the decedent's handwriting acquired by seeing her write and having received handwritten correspondence. It is the petitioner's opinion that the decedent signed the will. Petitioner believes that Lucy Valdez is deceased and efforts to contact Mikio Uchiyama, the other witness on the decedent's will dated 07/16/1990, have been unsuccessful.

Declaration filed 09/04/2014 by Susan Whitsitt, states she is the daughter of the decedent and has corresponded with the decedent throughout her lifetime. She has personal knowledge of the decedent's handwriting acquired by seeing her write and having received handwritten correspondence. It is Ms. Whitsitt's opinion that the decedent signed the will and believes that Lucy Valdez is deceased and efforts to contact Mikio Uchiyama, the other witness on the decedent's will dated 07/16/1990, have been unsuccessful.

<u>Note:</u> If the petition is granted status hearings will be set as follows:

- Thursday, 01/22/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u>
- Thursday, 11/19/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Reviewed by: LV
Reviewed on: 09/16/2014
Updates:
Recommendation:
File 14 - Loper

15

Atty

#### Petition for Settlement and Approval of Trustee's Account

		HOWARD J. DEMERA, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		· · · · · ·	
		Petitioner states on 10/15/1993, <b>JOSEPH F.</b>	Please see related cases on
		<b>DESMOND and EDNA F. DESMOND</b> , as Settlors and Trustees, executed a Trust	pages 16 – 19.
Со	ont. from	Agreement establishing the <b>DESMOND</b>	
	Aff.Sub.Wit.	FAMILY TRUST.	
✓	Verified	EDNA E DECMOND died on //0/100/ and	
	Inventory	<b>EDNA F. DESMOND</b> died on 6/9/1996 and by reason of her death the trust was	
	PTC	divided in to the <b>JOSEPH F. DESMOND</b>	
	Not.Cred.	SURVIVOR'S TRUST, the DESMOND MARITAL	
✓	Notice of Hrg	TRUST, the DESMOND GRANDCHILDREN'S TRUST and the DESMOND FAMILY TRUST.	
✓	Aff.Mail W/	After the death if <b>EDNA F. DESMOND</b> ,	
	Aff.Pub.	JOSEPH P. DESMOND became and acted	
	Sp.Ntc.	as sole Trustee of all the separate trusts and	
	Pers.Serv.	served as the sole Trustee until his death on 8/19/2007. Upon the death of <b>JOSEPH F.</b>	
	Conf.	<b>DESMOND</b> , petitioner <b>HOWARD J. DEMERA</b> ,	
	Screen	became Trustee of all of the trusts. This	
	Letters	petition relates to and present's petitioner's	
	Duties/Supp	accounting for his administration of the JOSEPH F. DESMOND SURVIVOR'S TRUST.	
	Objections	JOSEI II I. DESMOND SORVIVOR S IROSI.	
	Video Receipt	Petitioners accounting is presented in two	
	CI Report	periods.	
	9202	Account period: 8/19/07 – 7/31/08	
1	Order	7,0000111 peliod. 0/17/07 7/01/00	
	Aff. Posting	Accounting - \$15,395,615.71	Reviewed by: KT
	Status Rpt	Beginning POH - \$11,825,478.13 Ending POH - \$9,372,159.00	Reviewed on: 9/16/14
	UCCJEA	77,572,137.00	Updates:
	Citation	Account period: 8/1/09 - 11/16/11	Recommendation:
	FTB Notice		File 15 - Desmond
		Accounting - \$17,343,100.26 Beginning POH - \$9,372,159.00	
		Ending POH - \$0	
		-	
		Please see additional page	

## 15 Joseph F Desmond Survivors Trust

Case No. 14CEPR00683

### Wherefore, petitioner prays for an order of this Court:

- 1. Settling, allowing and approving the account and report of petitioner as Trustee as filed;
- 2. Confirming and approving all acts and proceedings of petitioner as Trustee.

Helon, Marvin T (for Petitioner/Trustee Howard DeMera)

Petition for Settlement and Approval of Trustee's Account

		Telinorior Semement and Approval or hoster	
		HOWARD J. DEMERA, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
-		Petitioner states on 10/15/1993, <b>JOSEPH F.</b>	Please see related cases on
		DESMOND and EDNA F. DESMOND, as	pages 15, & 17 – 19.
		Settlors and Trustees, executed a Trust	pages 10, a 11
Со	nt. from	Agreement establishing the <b>DESMOND</b>	
	Aff.Sub.Wit.	FAMILY TRUST.	
✓	Verified	FDNA F DECALOND die die en //0/100/ eve d	
	Inventory	<b>EDNA F. DESMOND</b> died on 6/9/1996 and by reason of her death the trust was	
	PTC	divided in to the <b>JOSEPH F. DESMOND</b>	
	Not.Cred.	SURVIVOR'S TRUST, the DESMOND MARITAL	
1	Notice of	TRUST, the DESMOND GRANDCHILDREN'S	
	Hrg	TRUST and the DESMOND FAMILY TRUST.	
✓	Aff.Mail W/	After the death if <b>EDNA F. DESMOND</b> ,	
	Aff.Pub.	JOSEPH P. DESMOND became and acted	
	Sp.Ntc.	as sole Trustee of all the separate trusts and	
	Pers.Serv.	served as the sole Trustee until his death on 8/19/2007. Upon the death of <b>JOSEPH F.</b>	
	Conf.	DESMOND, petitioner HOWARD J. DEMERA,	
	Screen	became Trustee of all of the trusts. This	
	Letters	petition relates to and present's petitioner's	
	Duties/Supp	accounting for his administration of the	
	Objections	DESMOND GRANDCHILDREN'S TRUST.	
	Video	Botitionars accounting is presented in two	
	Receipt	Petitioners accounting is presented in two periods.	
	CI Report	policus.	
	9202	Account period: 8/19/07 - 7/31/08	
✓	Order	A = = = = = = = = = = = = = = = = = = =	
	Aff. Posting	- Accounting - \$1,783,910.57 - Beginning POH - \$1,647,615.11	Reviewed by: KT
	Status Rpt	Ending POH - \$1,472,630.90	Reviewed on: 9/17/14
	UCCJEA	<b>1</b>	Updates:
	Citation	Account period: 8/1/09 - 11/16/11	Recommendation:
	FTB Notice		File 16 - Desmond
		Accounting - \$1,668,877.16	
		Beginning POH - \$1,472,630.90 Ending POH - \$ 10,522.19	
		- 3 10,322.17	
		Please see additional page	
_	<u> </u>	II	1/

### 16 Desmond Grandchildren's Trust

Case No. 14CEPR00684

#### Wherefore, petitioner prays for an order of this Court:

- 3. Settling, allowing and approving the account and report of petitioner as Trustee as filed;
- 4. Confirming and approving all acts and proceedings of petitioner as Trustee.

Helon, Marvin T (for Petitioner/Trustee Howard DeMera)

Petition for Settlement and Approval of Trustee's Account

Г		HOWARD J. DEMERA, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		<b>HOWARD J. DEMEKA,</b> Hostee, is perillorier.	NEEDS/FROBLEMS/COMMENTS.
<b> </b>		Petitioner states on 10/15/1993, <b>JOSEPH F.</b>	Please see related cases on
-		DESMOND and EDNA F. DESMOND, as	pages 15, 16, 18 & 19.
		Settlors and Trustees, executed a Trust	
Co	nt. from	Agreement establishing the <b>DESMOND</b>	
	Aff.Sub.Wit.	FAMILY TRUST.	
1	Verified		
	Inventory	EDNA F. DESMOND died on 6/9/1996 and	
	<u> </u>	by reason of her death the trust was	
	PTC	divided in to the JOSEPH F. DESMOND SURVIVOR'S TRUST, the DESMOND MARITAL	
<b> </b>	Not.Cred.	TRUST, the DESMOND GRANDCHILDREN'S	
✓	Notice of	TRUST and the DESMOND FAMILY TRUST.	
	Hrg	THE STATE OF THE PROPERTY OF T	
✓	Aff.Mail W/	After the death if <b>EDNA F. DESMOND</b> ,	
	Aff.Pub.	JOSEPH P. DESMOND became and acted	
	Sp.Ntc.	as sole Trustee of all the separate trusts and	
	Pers.Serv.	served as the sole Trustee until his death on	
-		8/19/2007. Upon the death of <b>JOSEPH F</b> .	
	Conf. Screen	<b>DESMOND</b> , petitioner <b>HOWARD J. DEMERA</b> ,	
<b> </b>		became Trustee of all of the trusts. This	
<b> </b>	Letters	petition relates to and present's petitioner's	
l	Duties/Supp	accounting for his administration of the DESMOND MARITAL TRUST.	
	Objections	DESMOND MARITAL TROST.	
	Video	Petitioners accounting is presented in three	
	Receipt	periods.	
	CI Report		
	9202	Account period: 8/19/07 – 7/31/08	
✓	Order	Accounting - \$8,727,481.35	
	Aff. Posting	Beginning POH - \$7,520,518.47	Reviewed by: KT
	Status Rpt	Ending POH - <b>\$7,118,165.39</b>	Reviewed by: Ki
	UCCJEA	Account period: 8/1/09 - 12/31/10	Updates:
	Citation	·	Recommendation:
	FTB Notice	Accounting - \$8,843,360.55	File 17 - Desmond
	I ID ITOILG	Beginning POH - \$7,118,165.39 Ending POH - \$6,136,803.37	THE IT DESITION
		Enaing POH - \$6,136,803.37	
		Account period: 1/1/11 - 11/16/11	
		Accounting - \$6,559,107.43	
		Beginning POH - \$6,136,803.37	
		Ending POH - \$0	
		Please see additional page	
			17

#### 17 Desmond Marital Trust

Case No. 14CEPR00685

#### Wherefore, petitioner prays for an order of this Court:

- 5. Settling, allowing and approving the account and report of petitioner as Trustee as filed;
- 6. Confirming and approving all acts and proceedings of petitioner as Trustee.

Petition for Settlement and Approval of Trustee's Account

	HOWARD J. DEMERA, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit.	Petitioner states on 10/15/1993, <b>JOSEPH F. DESMOND and EDNA F. DESMOND</b> , as Settlors and Trustees, executed a Trust Agreement establishing the <b>DESMOND FAMILY TRUST.</b>	Please see related cases on pages 15, 16, 17 & 19.
Verified  Inventory  PTC  Not.Cred.  ✓ Notice of Hrg  ✓ Aff.Mail W/  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen	EDNA F. DESMOND died on 6/9/1996 and by reason of her death the trust was divided in to the JOSEPH F. DESMOND SURVIVOR'S TRUST, the DESMOND MARITAL TRUST, the DESMOND GRANDCHILDREN'S TRUST and the DESMOND FAMILY TRUST.  After the death if EDNA F. DESMOND, JOSEPH P. DESMOND became and acted as sole Trustee of all the separate trusts and served as the sole Trustee until his death on 8/19/2007. Upon the death of JOSEPH F. DESMOND, petitioner HOWARD J. DEMERA, became Trustee of all of the trusts. This	
Letters  Duties/Supp Objections Video Receipt CI Report 9202	petition relates to and present's petitioner's accounting for his administration of the <b>DESMOND FAMILY EDUCATION TRUST</b> .  Petitioners accounting is presented in two periods.	
✓ Order  Aff. Posting Status Rpt UCCJEA Citation FTB Notice	Account period: 11/3/10 – 12/31/10  Accounting - \$3,150,880.10  Beginning POH - \$0  Ending POH - \$3,082,503.43  Account period: 8/1/09 – 11/16/11  Accounting - \$5,339,904.29  Beginning POH - \$3,082,503.43  Ending POH - \$3,048,259.92	Reviewed by: KT Reviewed on: 9/17/14 Updates: Recommendation: File 18 - Desmond
	Please see additional page	10

## 18 Desmond Family Education Trust (Trust)

Case No. 14CEPR00686

### Wherefore, petitioner prays for an order of this Court:

- 7. Settling, allowing and approving the account and report of petitioner as Trustee as filed;
- 8. Confirming and approving all acts and proceedings of petitioner as Trustee.

Helon, Marvin T (for Petitioner/Trustee Howard DeMera)

Petition for Settlement and Approval of Trustee's Account

		HOWARD J. DEMERA, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit.		Petitioner states on 10/15/1993, JOSEPH F. DESMOND and EDNA F. DESMOND, as Settlors and Trustees, executed a Trust Agreement establishing the DESMOND FAMILY TRUST.	Please see related cases on pages 15 - 18.
✓ Verified  Inventory  PTC  Not.Cred.  ✓ Notice of		EDNA F. DESMOND died on 6/9/1996 and by reason of her death the trust was divided in to the JOSEPH F. DESMOND SURVIVOR'S TRUST, the DESMOND MARITAL TRUST, the DESMOND GRANDCHILDREN'S	
Hrg  √ Aff.Mail	W/	After the death if EDNA F. DESMOND,  JOSEPH P. DESMOND became and acted	
Aff.Pub. Sp.Ntc. Pers.Serv.		as sole Trustee of all the separate trusts and served as the sole Trustee until his death on 8/19/2007. Upon the death of <b>JOSEPH F.</b>	
Conf. Screen Letters		<b>DESMOND</b> , petitioner <b>HOWARD J. DEMERA</b> , became Trustee of all of the trusts. This petition relates to and present's petitioner's accounting for his administration of the	
Objections Video		DESMOND FAMILY TRUST.  Petitioners accounting is presented in two	
Receipt CI Report 9202		periods.  Account period: 8/19/07 - 12/31/08	
<ul><li>✓ Order</li><li>Aff. Posting</li><li>Status Rpt</li></ul>		Accounting - \$3,332,831.10 Beginning POH - \$3,139,317.31 Ending POH - \$3,082,503.43	Reviewed by: KT Reviewed on: 9/17/14
UCCJEA Citation FTB Notice		Account period: 1/1/09 - 11/3/10	Updates: Recommendation: File 19 - Desmond
		Accounting - \$3,271,976.87 Beginning POH - \$3,079,748.01 Ending POH - \$0	
		Please see additional page	

## 19 Desmond Family Trust

#### Case No. 14CEPR00687

### Wherefore, petitioner prays for an order of this Court:

- 9. Settling, allowing and approving the account and report of petitioner as Trustee as filed;
- 10. Confirming and approving all acts and proceedings of petitioner as Trustee.

Atty Fanucchi, Edward L. (for Rosalinda Lopez – Daughter – Petitioner)

Atty Bagdasarian, Gary G. (Court-appointed for Conservatee)

Petition for Appointment of Probate Conservator of the Person

			NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.		ROSALINDA "LINDA" LOPEZ, Daughter, is Petitioner and requests appointment as Conservator of the Person with medical consent powers and dementia medication and placement powers.	Court Investigator advised rights on 9-5-14  Voting rights affected – need minute order.
<b>&gt;</b>	Verified Inventory PTC		Voting rights affected  Need Capacity Declaration.	Need Capacity     Declaration in support of     medical consent powers     with Dementia Attachment
>	Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.	W	Petitioner states the proposed Conservatee suffers from Alzheimer's and needs assistance with her daily activities, bathing, cooking, cleaning, walking, medications, etc.	in support of dementia medication and placement powers.  2. Need Order, Letters.
> >	Sp.Ntc. Pers.Serv. Conf.	W	Petitioner the proposed Conservatee currently resides with another daughter, Mary Hernandez, in Kingsburg, CA. She receives social security	Additional Note: Petitioner requests conservatorship of the person only, but details plans to open a
>	Screen Letters Duties/Supp	X	benefits and supplemental security benefits, which are supposed to be used for her support, personal items, medical supplies, Medicare copayments, etc. The payments are made to	"conservatorship bank account" for the conservatee's social security income. However, if there is
<b>&gt;</b>	Objections Video Receipt		Mary Hernandez. Petitioner wishes to have the social security payments payable to the conservator in a "conservatorship bank"	no conservatorship of the estate, then titling the account as "conservatorship bank account" may cause
Ė	CI Report 9202 Order	X	account" for preservation of the funds for the use they are intended.	confusion.
	Aff. Posting Status Rpt UCCJEA Citation		Court Investigator Dina Calvillo filed a report on 9-15-14.	Reviewed by: skc Reviewed on: 9-16-14 Updates: Recommendation:
	FTB Notice			File 20 - Pasillas

Atty Atty Wright, Janet L. (for Conservatee Barnett Seymour Salzman)

Motsenbocker, G.L. (for Vance Severin and Terri Severin – Temporary Conservators)
Status Hearing Re: Filing of First and Final Account of Temporary Conservator

	TEMP (ESTATE ONLY) EXPIRES 9-22-14	NEEDS/PROBLEMS/COMMENTS:
Cont. from 032913 042613, 061413, 100413. 011014, 062314	VANCE SEVERIN and TERRI SEVERIN, Brother and Sister of Mr. Salzman's wife, Stacy Salzman, were appointed as Temporary Co-Conservators of the Person and Estate without bond (bond upon permanent appointment) on 9-25-12.	1. Need first account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing
Aff.Sub.Wit.	A + -       -	verified status reports must
Verified	At a hearing on 11-5-12, the Court set status hearing for the filing of the I&A	be filed no later than 10
Inventory	= for 3-22-13.	days before the hearing.
PTC		Status Reports must comply
Not.Cred.	On 12-10-12, The Temporary Co-	with the applicable code
Notice of Hrg	Conservators were authorized to sell the Conservatee's real property, with	requirements. Notice of the
Aff.Mail	proceeds to be deposited into a	status hearing, together
Aff.Pub.	blocked account.	with a copy of the Status
Sp.Ntc.	At hearing on 1-7-13, the petition for	Report shall be served on all
Pers.Serv.	conservatorship of the <u>person</u> was	necessary parties.
Conf.	withdrawn, and the conservatorship	, ,
Screen	of the <u>estate</u> was extended to 3-29-	
Letters	13, but limited to the sale of the	
Duties/Supp	property and negotiate and settle	
Objections	<ul><li>with the Conservatee's creditors,</li><li>including California Franchise Tax</li></ul>	
Video Receipt	Board and IRS.	
CI Report	Also on 1-7-13, the Court set this status	
9202	hearing for filing of the First or Final	
Order	Account of Temporary Conservator.	
Aff. Posting		Reviewed by: skc
Status Rpt	Note: I&A filed 5-22-13 indicates the	Reviewed on: 9-16-14
UCCJEA	Conservatee's 50% real property	Updates:
Citation	interest valued at \$75,000.00.	Recommendation:
FTB Notice	Note: Per Status Report filed 5-7-14,	File 22 - Salzman
	escrow closed on 4-18-14.	

Atty Attý

David J. St. Louis (9764)
Roberts, David A. (for Joan St. Louis – Petitioner)
Cram, Donald H., III (for Bianca Soria – Limited Opposition)
Status Hearing

DOD: 10-7-12	JOAN ST. LOUIS, Spouse, filed Petition for Assumption of	NEEDS/PROBLEMS/
202.10 . 12	Law Practice of David St. Louis on 9-6-13.	COMMENTS:
	Background: Mrs. St. Louis' petition requested:	As of 3-25-14, a bond
Cont. from 111313,	1) That the Court assume jurisdiction over the law	has been filed; however,
112013, 010814,	practice of David J. St. Louis and appoint attorney	no status report has been
022614, 052814	<b>PAUL T. CHAMBERS</b> to represent and assist the Court in assuming jurisdiction;	filed.
Aff.Sub.Wit.	2) Allow Mr. Chambers to appoint himself as receiver	Note: Page B is the status
Verified	and take possession and control of any and all	hearing for filing of the
Inventory	bank accounts related to Mr. St. Louis' law	accounting.
PTC	practice, including the <b>attorney-client trust</b>	
Not.Cred.	account which contained \$54,502.09 at 3-31-13;	Note: There were no
Notice of Hrg	3) Coordinate with Allison St. Louis, former legal	appearances on 5-28-14
Aff.Mail	secretary, to determine the clients entitled to funds	
Aff.Pub.	and the amounts each is owed; 4) Upon determining the recipients and the amounts	
Sp.Ntc.	owed, that Mr. Chambers be allowed to issue	
Pers.Serv.	checks to the recipients without further court order;	
Conf. Screen	5) Specifically, that Mr. Chambers be allowed,	
Letters	without further Court order, to issue checks from a	
Duties/Supp	certain estate account (John K. Shirin Estate) to	
Objections	those recipients entitled thereto; and	
Video	6) Upon completion, provided accounting.	
Receipt	Non-Opposition to Petition was filed 9-30-13 by the	
CI Report	State Bar of California.	
9202		
Order	A Creditor's Claim and Request for Special Notice was	
Aff. Posting	filed 9-30-13 by Attorney J. Patrick Sullivan, who	Reviewed by: skc
Status Rpt	represents Walter Wentz, Creditor.	<b>Reviewed on:</b> 9-16-14
UCCJEA	Limited Opposition to Polition was filed 10.0.12 by	Updates:
Citation	Limited Opposition to Petition was filed 10-9-13 by BIANCA SORIA. Ms. Soria states she was a client of Mr.	Recommendation:
FTB Notice	St. Louis, who was wired \$65,000.00 in connection with	File 23A – St. Louis
	a settlement. Ms. Soria requested that as a condition	
	to granting the petition, that the Court direct Mr.	
	Chambers to distribute the funds to her, or to post	
	appropriate bond.	
	At hearing on 10-16-13, the Court granted the petition	
	with additional orders and set this status hearing. <u>See</u> <u>Page 2 for specifics.</u>	
	rage 2 ioi specifics.	
	Subsequent to the hearing, both attorneys David	
	Roberts and Donald Cram submitted competing	
	proposed orders.	
	Therefore, the Court will address the competing	
	proposed orders at this status hearing.	
	SEE ADDITIONAL PAGES	
	<u> </u>	23 /

#### Page 2

Minute Order 10-16-13: Mr. Cram is appearing via CourtCall on behalf of Bianca Soria. The Court accepts Mr. Roberts representation that Attorney Timothy Magill has been given notice. The Court finds that Patrick James' client has been properly served. The Court will allow the interlination under 9764. The Court grants the petition and waives bond. The Court orders that the \$41,155. 89 be paid within 30 days. The Court notes that there are no funds to pay Attorney Chambers and he is acting in pro bono. Matter set for Status Hearing on 11/13/13. If everything is completed by 11/13/13, no appearances will be necessary. Set on 11/13/13 at 9am in Dept 303 for Status Hearing. Additional hearing dates 3/6/14 at 9am Dept 303 for Status Re Accounting; Petition is granted; Order to be signed ex parte.

#### Attorney David A. Roberts submitted a proposed Order that contains orders as follows:

- 1. Granting the petition that the Court assume jurisdiction over the law practice, including, but not limited to, dispersing [sic] funds held in the attorney-client trust account;
- 2. Appointing Paul T. Chambers to represent and assist the Court in assuming jurisdiction over the law practice without bond and shall receive no compensation;
- 3. That Mr. Chambers coordinate with Allison St. Louis to determine the clients entitled to files, documentation, and/or funds and the amounts each is owed;
- 4. That the amount that Mr. Chambers finds due to Ms. Soria shall be paid within 30 days from the entry of this order without further Court order;
- 5. That Mr. Chambers be allowed to appoint himself receiver and take possession of the various accounts and have signature power over such accounts, including that certain account fbo John K. Shirin or his heirs:
- 6. That after determining the recipients of the files, documents, and money, and the amount thereof, that Mr. Chambers is given the authority to disburse such without further Court order;
- 7. That Mr. Chambers is authorized without further Court order to issue checks from the John K. Shirin account to those recipients entitled thereto;
- 8. That upon completing the foregoing tasks, Mr. Chambers provide an accounting, upon approval of which he shall be discharged; and
- 9. That Mr. Chambers inform the Court of any other action taken as the Court's representative;
- 10. Setting hearing for approval of the final account on 3-6-14.

Attorney Donald H. Cram submitted an <u>Alternate</u> proposed Order that includes, in addition to the above orders, that Mr. Chambers shall disburse no less than \$41,155.89 to Ms. Soria within 30 days without further Court order.

<u>Note</u>: Per Minute Order 2-26-14, bond of \$47,000.00 was required. Bond was filed 3-17-14. No further status report or accounting has been filed.

<u>Note</u>: The Court had originally set status hearing for 3-6-14 for the filing of the accounting. On 3-6-14, that status hearing was continued with this status hearing. See Page B.

<u>Update</u>: The Order for Court Assumption of the Law Practice of David J. St. Louis, Deceased, and Appointing Paul T. Chambers Practice Administrator with Related Powers of Administration was signed on 3-26-14. <u>An Amended Order</u> was apparently signed by the Court 5-14-14, which included specific distribution relative to the Shirin Estate, although this matter is not specifically before the Court.

However, there were no appearances at this Status Hearing or at the related Status Hearing Re Accounting on 5-28-14 and the matter was continued to 6-25-14.

Note: The amended order was apparently submitted to the Court ex parte for signature. \$60.00 is due.

Atty Chambers, Paul T. (Practice Administrator)

Status Hearing Re: Filing of Accounting of the Practice Administrator

	DAVID J. ST. LOUIS, an attorney, passed	NEEDS/PROBLEMS/COMMENTS:
	away 10-7-12.	Continued from 3-6-14, 3-26-14, 5-28-14
Cont. from 030614, 032614, 052814	On 10-16-13, pursuant to the petition of JOAN ST. LOUIS, Attorney PAUL T. CHAMBERS was appointed as Practice Administrator pursuant to Probate Code §9764 without	Need account or <u>verified written</u> <u>status report</u> pursuant to local rules.
Aff.Sub.Wit.	bond.	roles.
Verified		
Inventory	At the hearing on 10-16-13, the Court set this status hearing for the filing of a final	
PTC	accounting by the Practice Administrator	
Not.Cred.	pursuant to Probate Code §9764(h).	
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report	1	
9202	1	
Order		
Aff. Posting	1	Reviewed by: skc
Status Rpt	1	Reviewed on: 9-16-14
UCCJEA		Updates:
Citation	1	Recommendation:
FTB Notice		File 23B – St. Louis

23B

## Lauren & Jenelle Jaramillo (GUARD/P)

24

Case No. 13CEPR00984

Hopper, Cindy J (for Ruben and Erlinda Macedo – Maternal Grandparents – Petitioners) Atty Atty Calhoun, Ronald L. (for John Jaramillo – Father – Objector)

Status Hearing Re: Petition for Appointment of Guardian of the Person

	TEMP EXPIRES 9-22-14	NEEDS/PROBLEMS/COMMENTS:
	RUBEN MACEDO and ERLINDA MACEDO, maternal grandparents, are Petitioners.	At Court Trial on 3-20-14, the parties entered into a temporary agreement as set forth by Ms.
Aff.Sub.Wit.	Father: <b>JOHNNY JARAMILLO</b> – Personally served 12/06/13  – Objection Filed 01/10/14	Hopper and the temporary guardianship was extended to 9-22-14.
PTC Not.Cred.	Mother: <b>CYNTHIA MACEDO</b> - Consent & Waiver of Notice filed 11/07/13	Note: According to the minute order, this matter was continued to 9-22-14 at 9:00 a.m. in Dept.
Notice of Hrg Aff.Mail	Paternal grandfather: DECEASED Paternal grandmother: DORA JARAMILLO – Notice dispensed 12/12/13	303; therefore, the matter was scheduled at 9:00. However, Ms. Hopper's Order After Hearing
Aff.Pub. Sp.Ntc.	Minors: Lauren Jaramillo and Jenelle Jaramillo	indicates 10:00 a.m.
Pers.Serv. Conf. Screen	- consent and waive notice  Sibling: Johnny Jaramillo  - Served by mail 11/22/2013	
Letters   Duties/Supp   Objections	Petitioners filed this petition for guardianship on 11-7-13.	
Video Receipt CI Report	John Jaramillo, Father, objected.	
9202 Order Aff. Posting	Court Investigator Jennifer Daniel filed a report on 01/06/2014.	Reviewed by: skc
Status Rpt UCCJEA Citation		Reviewed by: 38C  Reviewed on: 9-17-14  Updates:  Recommendation:
FTB Notice		File 24 - Jaramillo

## George Bonilla-Ramirez & Azariah Ramirez

ez Case No.

13CEPR00188

25 Atty Atty

Bonilla, Melissa Marie (Pro Per – Mother – Petitioner)

Galindo, Roberta J. (Pro Per – Maternal Grandmother – Guardian)

Petition for Termination of Guardianship

	MELISSA MARIE BONILLA, Mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:  1. If this petition goes forward,
	ROBERTA J. GALINDO, Maternal Grandmother, was appointed guardian of George on 5-7-13 and of Azaria on	need proof of service of Notice of Hearing on <u>all relatives</u> pursuant to Probate Code
Aff.Sub.Wit.	1-22-14.	§1460(b)(5).
Verified	Falls and CEORGE DAMINET	
Inventory	Father: <b>GEORGE RAMIREZ</b> Paternal Grandfather: George Ramirez	
PTC	Paternal Grandmother: Lisa Ramirez	
Not.Cred.	Maternal Grandfather: Sergio Bonilla	
Notice of		
Hrg	<b>Petitioner states</b> she is now able to take	
Aff.Mail	care of her kids and wants full	
Aff.Pub.	responsibility.	
Sp.Ntc.	Court Investigator Julie Negrete filed a	
Pers.Serv.	report on 9-10-14.	
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting	<u> </u>	Reviewed by: skc
Status Rpt	_	Reviewed on: 9-17-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 25 – Bonilla-Ramirez

Carl E. Morris (Spousal)

Morris, Barbara (Pro Per – Surviving Spouse – Petitioner)

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 2-2-01	BARBARA MORRIS, Spouse, is	NEEDS/PROBLEMS/COMMENTS:	
	Petitioner.		
		Continued from 8-18-14. As of 9-16-14,	
	Petition is incomplete.	nothing further has been filed.	
Cont from 081814		Need amended petition based on the	
Aff.Sub.Wit.		following:	
Verified			
Inventory		1. The petition is blank at #4c – intestate or	
PTC		will?	
Not.Cred.		2. The petition is blank at #6 at #9. Was the	
Notice of		decedent survived by any other relatives?	
Hrg			
Aff.Mail		The petition is blank at #7 and does not contain an attachment regarding what	
Aff.Pub.		property Petitioner is requesting to be	
Sp.Ntc.		determined to pass to her.	
Pers.Serv.			
Conf.		4. The petition is blank at #12. Need	
Screen Letters		verification that a petition for probate is	
Duties/Supp		not being filed (#12c).	
Objections		5. Petitioner does not state any facts	
Video		necessary to make a determination of	
Receipt		property passing to her as spouse. When	
CI Report		were Petitioner and Decedent married? When was the property acquired? How	
9202		was the property acquired? Any other	
Order		details relevant pursuant to Probate Code	
		§13651.	
		, This was the same of the same	
		6. This petition was filed with a fee waiver. If property is determined to pass to	
		Petitioner, the filing fee of \$435.00 will be	
		due.	
Aff. Posting		Reviewed by: skc	
Status Rpt		Reviewed on: 9-16-14	
UCCJEA		Updates:	
Citation		Recommendation:	
FTB Notice	IB Notice File 26 - Morris		